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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0052

2010

For calendar year 2010, or tax year beginning 01-01-2010 , and ending 12-31-2010

G Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

Name of foundation
SAMARITAN FOUNDATION

Number and street (or P O box number if mail is not delivered to street address)
PO BOX 97

City or town, state, and ZIP code
HAVILAND, OH 458510097

A Employer identification number
34-1957355

B Telephone number (see page 10 of the instructions)
(419) 622-4611

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

H Check type of organization ☒ Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust

☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16)
\$ 4,349,881

J Accounting method ☒ Cash ☐ Accrual
☐ Other (specify) _____
(Part I, column (d) must be on cash basis.)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	897,696			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	3,531	3,531	3,531	
	4 Dividends and interest from securities.	14,954	14,954	14,954	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 ☐	923			
	b Gross sales price for all assets on line 6a _____ 923				
	7 Capital gain net income (from Part IV, line 2)				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
Operating and Administrative Expenses	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	917,104	18,485	18,485	
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) ☐	1,000	500	500	500
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions) ☐	357			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) ☐	225	113	113	112
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	1,582	613	613	612
	25 Contributions, gifts, grants paid	528,715			528,715
	26 Total expenses and disbursements. Add lines 24 and 25	530,297	613	613	529,327
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	386,807			
	b Net investment income (if negative, enter -0-)		17,872		
	c Adjusted net income (if negative, enter -0-)			17,872	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	1,326,540	1,451,007	1,451,007
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	2,182,182	2,444,622	2,898,874
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
Liabilities	15	Other assets (describe ▶ _____)	223	123	
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	3,508,945	3,895,752	4,349,881
	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
Net Assets or Fund Balances	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	
		Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted	3,508,945	3,895,752	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	3,508,945	3,895,752	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	3,508,945	3,895,752	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1	3,508,945
2	Enter amount from Part I, line 27a	2	386,807
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	3,895,752
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	3,895,752

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
a				
b				
c				
d				
e				
2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8 }		3	

Part V

Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If “Yes,” the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries			
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2009	415,357	3,382,568	0 122793
2008	657,898	3,333,684	0 197349
2007	682,237	2,968,160	0 229852
2006	275,102	2,480,326	0 110914
2005	350,443	2,004,283	0 174847
2 Total of line 1, column (d).			2 0 835755
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			3 0 167151
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5.			4 3,806,040
5 Multiply line 4 by line 3.			5 636,183
6 Enter 1% of net investment income (1% of Part I, line 27b).			6 179
7 Add lines 5 and 6.			7 636,362
8 Enter qualifying distributions from Part XII, line 4.			8 529,327
If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18			

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)			
1aExempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
bDomestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	357
cAll other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	
3Add lines 1 and 2.		3	357
4Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	
5Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	357
6Credits/Payments			
a	2010 estimated tax payments and 2009 overpayment credited to 2010	6a	480
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7Total credits and payments Add lines 6a through 6d.		7	480
8Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8	
9Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	123
11Enter the amount of line 10 to be Credited to 2011 estimated tax 123 Refunded		11	

Part VII-AStatements Regarding Activities			
1aDuring the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?			YesNo
bDid it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		1a1b	NoNo
cDid the foundation file Form 1120-POL for this year?.		1c	No
dEnter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ (2) On foundation managers \$			
eEnter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$			
2Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		2	No
3Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3	No
4aDid the foundation have unrelated business gross income of \$1,000 or more during the year?.		4a	No
bIf "Yes," has it filed a tax return on Form 990-T for this year?.		4b	
5Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		5	No
6Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		6	Yes
7Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV		7	Yes
8aEnter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) OH			
bIf the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .		8b	Yes
9Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV		9	No
10Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		10	No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of TODD STOLLER Telephone no (419) 622-4611 Located at PO BOX 97 HAVILAND OH ZIP+4 45851			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year.			
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	15		
See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country.				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).	☐ Yes ☒ No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.		1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?		1c	
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? If "Yes," list the years 20____, 20____, 20____, 20____	☐ Yes ☒ No		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions).		2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No		
b	If "Yes," did it have excess business holdings in 2010 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010.).		3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a	No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2010?		4b	No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions).

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b

If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)?

Organizations relying on a current notice regarding disaster assistance check here.

☒

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

☐ Yes ☒ No

If "Yes" to 6b, file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☐ No

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

5b

6b

7b

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
RUSSELL STOLLER 175 PAPAYA DR N 10 ZAPATA, TX 78076	PRESIDENT 0 50	0	0	0
CRAIG STOLLER 306 N MCKINLEY HAVILAND, OH 45851	VICE PRES 0 50	0	0	0
TODD STOLLER 4824 ROAD 71 PAYNE, OH 45880	SEC - TREAS 0 50	0	0	0

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000.

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments. See page 24 of the instructions	
3	
Total. Add lines 1 through 3.	

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	2,665,119
b	Average of monthly cash balances.	1b	1,198,881
c	Fair market value of all other assets (see page 24 of the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	3,864,000
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	3,864,000
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	57,960
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,806,040
6	Minimum investment return. Enter 5% of line 5.	6	190,302

Part XI

Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☒ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	190,302
2a	Tax on investment income for 2010 from Part VI, line 5.	2a	357
b	Income tax for 2010 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	357
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	189,945
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	189,945
6	Deduction from distributable amount (see page 25 of the instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	189,945

Part XII

Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	529,327
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	529,327
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions).	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	529,327
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see page 26 of the instructions)

		(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1	Distributable amount for 2010 from Part XI, line 7				189,945
2	Undistributed income, if any, as of the end of 2010				
a	Enter amount for 2009 only.				
b	Total for prior years 20____, 20____, 20____				
3	Excess distributions carryover, if any, to 2010				
a	From 2005.				251,273
b	From 2006.				153,218
c	From 2007.				536,607
d	From 2008.				492,616
e	From 2009.				246,706
f	Total of lines 3a through e.	1,680,420			
4	Qualifying distributions for 2010 from Part XII, line 4 ▶ \$ 529,327				
a	Applied to 2009, but not more than line 2a				
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .				
d	Applied to 2010 distributable amount.				189,945
e	Remaining amount distributed out of corpus	339,382			
5	Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6	Enter the net total of each column as indicated below:				
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,019,802			
b	Prior years' undistributed income Subtract line 4b from line 2b.				
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d	Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions . . .				
e	Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions				
f	Undistributed income for 2010 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011.				0
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions).				
8	Excess distributions carryover from 2005 not applied on line 5 or line 7 (see page 27 of the instructions).	251,273			
9	Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	1,768,529			
10	Analysis of line 9				
a	Excess from 2006.				153,218
b	Excess from 2007.				536,607
c	Excess from 2008.				492,616
d	Excess from 2009.				246,706
e	Excess from 2010.				339,382

Part XIV

4942(j)(3) or 4942(j)(5)

3 Complete 3a, b, or c for the alternative test relied upon

a "Assets" alternative test—enter

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . .

c "Support" alternative test—enter

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Part XV

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number of the person to whom applications should be addressed

TODD CRAIG STOLLER
PO BOX 97
HAVILAND, OH 45851
(419) 622-4611

b The form in which applications should be submitted and information and materials they should include
SEE ATTACHED APPLICATION FORM

c Any submission deadlines
NONE

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

SEE ATTACHED

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data TableSee Additional Data Table				
Total			▶ 3a	528,715
b Approved for future payment				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments.					
3 Interest on savings and temporary cash investments			14	3,531	
4 Dividends and interest from securities.			14	14,954	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	923	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. . .					
11 Other revenue a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal Add columns (b), (d), and (e). . .				19,408	
13 Total. Add line 12, columns (b), (d), and (e). 13					19,408

[illegible]

Part XVII

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

1

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a

Transfers from the reporting foundation to a noncharitable exempt organization of

1

Cash.

1a(1)

No

2

Other assets.

1a(2)

No

b

Other transactions

1

Sales of assets to a noncharitable exempt organization.

1b(1)

No

2

Purchases of assets from a noncharitable exempt organization.

1b(2)

No

3

Rental of facilities, equipment, or other assets.

1b(3)

No

4

Reimbursement arrangements.

1b(4)

No

5

Loans or loan guarantees.

1b(5)

No

6

Performance of services or membership or fundraising solicitations.

1b(6)

No

c

Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

1c

No

d

If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

2a

Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

☐

Yes

☒

No

b

If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
--------------------------	--------------------------	---------------------------------

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

2011-05-06

Date

Title

Paid Preparer's Use Only

Preparer's Signature

RODNEY L STOLLER

Date

2011-05-12

Check if self-employed

☐

PTIN

Firm's name

AREND LAUKHUF & STOLLER INC

Firm's EIN

Firm's address

VAN WERT, OH 45891

Phone no

(419) 238-0658

Form 990-PF (2010)

Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

2010

Name of organization SAMARITAN FOUNDATION	Employer identification number 34-1957355
--	--

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule—

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ, that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or 990-EZ, that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or 990-EZ, that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ _____

Caution. An Organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer “No” on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization SAMARITAN FOUNDATION	Employer identification number 34-1957355
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Part I

Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	MODERN PLASTIC RECOVERY INC PO BOX 38 HAVILAND, OH 45851	\$ 137,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
2	HAVILAND DRAINAGE PRODUCTS CO PO BOX 97 HAVILAND, OH 45851	\$ 173,400	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
3	HAVILAND PLASTIC PRODUCTS CO PO BOX 38 HAVILAND, OH 45851	\$ 294,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
4	DRAINAGE PRODUCTS INC PO BOX 61 HAVILAND, OH 45851	\$ 292,296	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution)

Name of organization SAMARITAN FOUNDATION	Employer identification number 34-1957355
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Part II Noncash Property (see Instructions)			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
4	1,500 SHARES BRK B STOCK	\$ 125,220	2010-09-15
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
4	2,100 SHARES BRK B STOCK	\$ 167,076	2010-02-22
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Name of organization SAMARITAN FOUNDATION	Employer identification number 34-1957355
--	--

Part III

Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year. (Complete columns (a) through (e) and the following line entry)

For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **\$1,000 or less** for the year (Enter this information once See instructions) ▶ \$

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee		
—			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee		
—			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee		
—			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee		
—			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee		

Additional Data

Software ID:
Software Version:
EIN: 34-1957355
Name: SAMARITAN FOUNDATION

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BEN SHARRON GASSER 4399 E PLEASANT HOME RD CRESTON,OH 44217	NONE	PRIVATE	AID TO NEEDY FAMILY	5,000
CARLISE CHILD BENEFIT-FFB 905 N WILLIAMS ST PAULDING,OH 45879	NONE	PUBLIC	AID TO NEEDY FAMILY	2,000
ERIC MARTINEZ BENEFIT 201 N MAIN ST PAULDING,OH 45879	NONE	PRIVATE	AID TO NEEDY FAMILY	2,000
TIFFANY BATES FAMILY BENE CR 19 FAYETTE,OH 43521	NONE	PRIVATE	AID TO NEEDY FAMILY	2,500
JEREMY LEE FAMILY 9072 SR 500 PAULDING,OH 45879	NONE	PRIVATE	AID TO NEEDY FAMILY	2,500
INDIGNANT AID 1000 N/A PAULDING,OH 45879	NONE	PRIVATE	AID TO NEEDY FAMILY	750
APOSTOLIC CHRISTIAN WORLD 16448 S US HWY 231 REMINGTON,IN 47977	NONE	PUBLIC	HUMANITARIAN AID & ASSISTANCE	35,000
CHRISTIAN CHILD CARE COAL 4102 NW DONDEE LN TOPEKA,KS 66618	NONE	PUBLIC	GENERAL PURPOSES	2,100
COMMUNITY HEALTH PROFESSI 250 DOLEY DR STE A PAULDING,OH 45879	NONE	PUBLIC	GENERAL PURPOSES	1,000
DEN HERDER FUNERAL HOME PO BOX 27 PAULDING,OH 45879	NONE	PRIVATE	AID TO NEEDY FAMILY	10,085
GALILEAN HOME MINISTRIES PO BOX 880 LIBERTY,KY 42539	NONE	PUBLIC	GENERAL PURPOSES	10,000
GATEWAY WOODS PROMISE FUN 14505 KLOPFENSTEIN ROD LEO,IN 46765	NONE	PUBLIC	GENERAL PURPOSES	25,000
JUNCTION APOSTOLIC CHRIST 15032 CAMPELL RD DEFIANCE,OH 43512	NONE	PUBLIC	HUMANITARIAN AID	15,000
KIDNEY FND OF NW OH 3100 W CENTRAL AVE TOLEDO,OH 43606	NONE	PUBLIC	GENERAL PURPOSES	2,000
LATTY APOSTOLIC CHRISTIAN 9257 RD 144 PAULDING,OH 45879	NONE	PUBLIC	GENERAL PURPOSES / HUMANITARIAN AID	291,000
Total ▶ 3a				528,715

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
LOVING SHEPHERD MINISTRIE PO BOX 375 BLUFFTON,IN 46714	NONE	PUBLIC	GENERAL PURPOSES	25,000
NATIONAL MULTIPLE SCLEROS 771 INTERNATIONAL DR FRANKLIN,IN 46131	NONE	PUBLIC	GENERAL PURPOSES	1,000
OPERATION REBIRTH 1638 APPLE RD ST PARIS,OH 43072	NONE	PUBLIC	GENERAL PURPOSES	15,000
PAULDING CO AREA FNDTN 103 1/2 E PERRY ST PAULDING,OH 45879	NONE	PUBLIC	GENERAL PURPOSES	6,200
PAYNE LIBRARY PO BOX 736 PAYNE,OH 45880	NONE	PUBLIC	GENERAL PURPOSES	2,000
PENNY PITCH INC 2915 MAPLES RD FORT WAYNE,IN 46816	NONE	PUBLIC	GENERAL PURPOSES	10,000
RONALD MCDONALD HOUSE PO BOX 779 TOLEDO,OH 43697	NONE	PUBLIC	GENERAL PURPOSES	3,650
UNITED WAY OF PAULDING CO 101 E PERRY ST PAULDING,OH 45879	NONE	PUBLIC	GENERAL PURPOSES	3,000
VAN HORN EAGLE FUNERAL HO 40 S MANNING ST HILLSDALE,MI 49242	NONE	PRIVATE	AID TO NEEDY FAMILY	3,930
WAYNE TRACE 8TH GRADE 4915 US 127 HAVILAND,OH 45851	NONE	PUBLIC	GENERAL PURPOSES	5,000
WEST OHIO FOOD BANK PO BOX 15666 LIMA,OH 45802	NONE	PUBLIC	GENERAL PURPOSES	48,000
Total  3a				528,715

TY 2010 Accounting Fees Schedule

Name: SAMARITAN FOUNDATION

EIN: 34-1957355

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	1,000	500	500	500

TY 2010 Compensation Explanation

Name: SAMARITAN FOUNDATION

EIN: 34-1957355

Person Name	Explanation
RUSSELL STOLLER	
CRAIG STOLLER	
TODD STOLLER	

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2010 Gain/Loss from Sale of Other Assets Schedule

Name: SAMARITAN FOUNDATION

EIN: 34-1957355

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Met hod	Sales Expenses	Total (net)	Accumulated Depreciat ion
RESERVE FUND RECOVERY	2008-01	PURCHASE	2010-01		923				923	

**TY 2010 Investments Corporate
Stock Schedule****Name:** SAMARITAN FOUNDATION**EIN:** 34-1957355

Name of Stock	End of Year Book Value	End of Year Fair Market Value
BERKSHIRE HATHAWAY	1,737,316	2,058,827
WAL-MART	237,001	275,043
AMERICAN EXPRESS	81,820	85,840
GENERAL ELECTRIC	153,810	91,450
SHERWIN WILLIAMS	150,970	251,250
US BANCORP	81,896	134,850
TELEFONOS DE MEXICO	1,809	1,614
RESERVE FUND		

TY 2010 Other Assets Schedule

Name: SAMARITAN FOUNDATION

EIN: 34-1957355

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
EXCISE TAX OVERPAYMENT	223	123	

TY 2010 Other Expenses Schedule**Name:** SAMARITAN FOUNDATION**EIN:** 34-1957355

Description	Revenue and Expenses per Books	Net Invest ment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
STATE FILING FEES	200	100	100	100
SUPPLIES	25	13	13	12

TY 2010 Taxes Schedule

Name: SAMARITAN FOUNDATION

EIN: 34-1957355

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAX	357			

SAMARITAN FOUNDATION GRANT-MAKING PROCEDURES

Samaritan Foundation (the Foundation) is located in Paulding County, Ohio. Paulding County is primarily a rural farm community. Much of the national economic expansion between 1980 and 2000 has by-passed this agrarian community. A significant segment of the County's population is economically disadvantaged.

The Foundation's purpose is to:

1. Make grants to individuals and groups to promote the betterment of the general public;
2. Make loans to economically disadvantaged individuals or groups where conventional sources of funds are unwilling or unable to provide such funds;
3. Grant scholarships to individuals on the basis of academic qualifications and financial need of the grantees;
4. Make contributions to any organization exempt from tax under section 501(c)(3) of the Internal Revenue Code.

Grants, loans, and scholarships will be awarded on an objective and nondiscriminatory basis, in accordance with this document. Such awards are provided with the understanding the recipient will use the funds in accordance with the guidelines set forth in IRC §4945(g)(1) and Reg. §53.4945-4(a) for educational or specific skill improvement purposes.

Grants to indigent individuals based on financial need will be used for such necessary items as food, clothing furniture and other items of basic sustenance. The grant program will increase the economic opportunities of those who are economically disadvantaged and alleviate the distress caused by their situations.

Loans will also be made to indigent individuals in economic distress. The purpose of such loans is to encourage the economic development of such disadvantaged groups. Loans will be based on financial need of the individuals and the inability to obtain conventional financing. Loans based on financial need would be made at below market rates of interest.

Scholarships will be granted on the basis of academic qualifications and financial need of the grantees. The Foundation may grant scholarships each year to graduates of local high schools to permit the recipients to attend college, technical school, trade school or other accredited institutions. The availability of scholarships will be made known by written communication each year to high school principals. The Foundation will obtain information from each high school on the academic qualifications, background and financial need of applicants. The Foundation will require each applicant be recommended by two teachers or by the principal of his or her high school. The Foundation officer responsible for making awards will review all application forms. The Foundation will obtain annual reports on academic performance of the scholarship recipient from the college that he or she attends.

All grants and loans will be awarded on an objective and nondiscriminatory basis and pursuant to the Foundation's tax-exempt purpose. Adequate records will be maintained to show:

1. the name of the individual;
2. the individual's address;
3. the amount distributed;
4. the purpose for which the aid was given; and
5. the manner in which the recipient was selected.

Individuals selected will be chosen on the basis of criteria reasonably related to the purpose of the grant. The grants will be awarded on an objective and nondiscriminatory basis to disadvantaged groups, defined in a sufficiently large as to constitute a charitable class. Each case involving financial need will be reviewed thoroughly and, where possible, involve a church or other social welfare organization.

The person or group of persons who select recipients of grants will not derive a private benefit, directly or indirectly, in the selection of individual recipients.

The Samaritan Foundation

COLLEGE SCHOLARSHIP APPLICATION FORM

A. STUDENT INFORMATION

Name: _____ Date: _____

Address: _____

Phone: _____ E-Mail: _____

Students Status (circle one): Single Married College: _____

Terms (circle one): Quarter Semester

Address: _____

Grade Next September (circle one): Freshman Sophomore Junior Senior 5th year

Course of Study (major): _____

Length of Program (circle one): 2 4 5 years Expected Date of Graduation: _____

Should you receive a scholarship from the Samaritan Foundation, will this reduce scholarship dollars received from your college or university? (circle one):

Yes

No

Unknown

Not Applicable

B. PARENTS INFORMATION

Parents Name: _____

Address: _____

Phone: _____

Parents Status (circle one): Married Divorced Separated Widowed

Place of Employment: Father: _____

Mother: _____

Number of Dependent Children in College During 2001-2002 Academic Year: _____

ITEMS THAT MUST ACCOMPANY THIS APPLICATION:

1. Copy of parents (or students if Independent) IRS Form 1040 – Pages 1 and 2. Both parents forms if filing separately are required. If student is claiming Independent, form must show student claiming themselves.
2. Small picture if not previously submitted.
3. College Transcript for first time applicant – spring term grade sheet thereafter.